

## PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



April 7, 2009

Brian K. Cherry, Vice President, Regulatory Relations  
Pacific Gas and Electric Company  
77 Beale St.  
San Francisco, CA 94177

Re: Approval for The 2009 California Solar Initiative Interim Marketing and Outreach Plan

Dear Mr. Cherry:

This letter conditionally approves the 2009 California Solar Initiative Interim Marketing and Outreach Plan (CSI M&O) submitted by PG&E on December 15, 2008. Energy Division approval confers an Interim (2009) M&O budget of \$600,000 that includes a 20% adder for additional program outreach activities, approved by Energy Division, in accordance with D.07-05-047.

Energy Division Staff has provided direction on implementation of the plan so it best integrates with other statewide activities, such as advanced metering. Please refer to "Attachment A: Energy Division Staff Implementation Notes and Request for Additional Follow-up" for further direction on activities and budget allocations.

Staff recommends a standardized M&O activity approval request form based on the approval process for CSI M&O materials that records estimated and actual costs of M&O Projects. This form is described in detail in "Attachment B: CSI Interim M&O Approval Procedures. Interim M&O materials and budgeted activities that do not receive approval prior to expenditure are subject to disallowance. Please submit this form when making approval requests from Energy Division staff.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Julie A. Fitch'.

Julie A. Fitch  
Director, Energy Division

Attachments: Energy Division Staff Implementation Notes; M&O Approval Guidelines  
Cc: R.08-03-008 Service List

**Energy Division Staff Implementation Notes and Request for Additional Follow-up  
for the 2009 California Solar Initiative  
Interim Marketing and Outreach Activities**

Refer to Interim M&O Approval Procedures, attached to this document, for instructions on how to submit collateral for Energy Division approval prior to distribution and expenditure.

**Staff Recommendations to PG&E's Interim M&O Activities**

The following activities are approved by the Energy Division, with implementation notes:

1. Training and Education \$100,000  
Staff advises PG&E to maintain a database of class attendees, and develop strategies to follow-up with attendees.
2. Outreach \$65,000  
PG&E will seek Energy Division input when developing PG&E forums in support of the CSI Program to ensure that effective solar industry targets are reached and program goals met.
3. Program Outreach Materials \$370,000
  - 3.1. Direct Mail Campaign \$250,000. Provide Staff with proposed DM targets, campaign schedule and follow-up strategy, including plans to report on campaign's effectiveness. Please follow the standard Interim M&O Approval Process when submitting materials to the Energy Division for approval.
  - 3.2. Fact Sheets \$10,000. Provide Staff with a fact sheet development schedule within 30 days of this letter that details the actual deliverables, and identifies project leads.
  - 3.3. Printing Enhanced Consumer Guide \$7,000
  - 3.4. PG&E Solar Guide \$33,000
  - 3.5. Participation in IDSM Collateral \$10,000. Submit examples of PG&E's IDSM collateral to which CSI messaging may be added, including a brief description of distribution channels and follow the standard M&O approval guidelines when seeking approval of all CSI-related messaging. Please note that the Go Solar California Logo must appear in an appropriate format/layout in all CSI-related messaging, including IDSM pieces. The logo requirements are available from Energy Division staff.
  - 3.6. 2010 Wall Calendar \$20,000.
  - 3.7. Integrated Tutorial \$20,000. Indicate to Staff whether this is a PA project or if the tutorial will be effectively shared as a coordinated, statewide piece.
  - 3.8. Enhanced Digitized Consumer Guide \$4,500
  - 3.9. Integrated website maintenance \$12,000
  - 3.10. Participation in CSI and Integrated Newsletters \$4,000
4. Tools \$54,500
  - 4.1. Consumer Bid Protection Form \$4,500. PAs should design this form for statewide use, and work with Energy Division Staff to review the form as it develops. Submit the final product as per any other M&O collateral (see "Approval Guidelines," attached.)
  - 4.2. Solar Mapping/Customer Billing Tool and Request to Carry Over 2008 Funds \$100,000. PG&E will develop a software application that will enable customers to link their PG&E billing info directly into a variety of mapping and solar financial analysis platforms. Using standard "materials approval" protocol, attached, please submit a Solar Mapping/Customer Billing Tool Development Brief that identifies vendors, deliverables and deployment schedule within 14 days of this letter.
    - 4.2.1. Although the Decision provides PAs with annual budgets, Staff grants the carry over request based on the expected merits of the mapping tool.



5. Value Tracking Methodologies \$10,000  
PAs identified a coordinated survey to determine the effectiveness of CSI M&O activities to date. PAs will coordinate to determine scope and costs of market effectiveness survey and provide a coordinated marketing effectiveness survey scoping plan that identifies the assumptions, scope and evaluation methods planned for the activity within 30 days of this letter.

#### **Additional Needs to be Addressed During the 2009 Interim Phase**

1. Advanced Metering:  
To support consumers' evaluation of solar options during the advanced meter rollouts scheduled per R.02-06-001, the Advanced Metering Initiative (AMI) Staff requests that PG&E identify opportunities to provide CSI messaging—perhaps as part of an integrated DSM effort—to customers during key touch-points as the new meters are deployed under AMI.
2. Community Outreach:  
The evolving solar market requires integrated approaches for marketing and outreach to be fully effective, and supports PG&E's approach to flexible, "grass-roots" community outreach, alliances and co-promotions. As in past budget cycles, a degree of fungibility is acceptable for strategic community solar promotion. PAs are directed to submit an outline of events for 2009 and bundled outreach opportunities that will be expensed to this account.
3. Branding:  
To support the value of the Go Solar California brand, PAs must use the GSC logo on all CSI materials and messaging opportunities, following approved logo usage guidelines (available from Energy Division staff.) Staff will provide the appropriate graphic files upon request.
4. Go Solar, California Web Portal:  
Staff encourages PG&E to take "ownership" of its own portal on the Go Solar California website that provides users with high-level CSI information and links to the PG&E website.
5. Approval Format and Expense Reporting:  
Follow the updated approval format when submitting materials for Energy Division review and approval. To receive final approval for individual collateral and activities, PAs should provide a file of the proposed material and project details on the Approval Request Form. The format is found in Attachment B: Approval Process. The approval form will enable the CPUC to track and maintain data on all CSI-funded M&O activities, and will be requested in addition to semi annual administrative expense report filings. Please continue to follow the Standardized Expense Reporting Worksheet when itemizing expenses associated with interim M&O activities.

## Attachment B

### CSI Approval Procedure for Interim Marketing and Outreach Materials

In accordance with D.07-05-047, Appendix A, Item 6, "PAs shall send final versions of basic marketing and collateral materials, in the form of program brochures, fact sheets, and general consumer education kits, to the Director of the Energy Division when ready for review." Internet banner ads, radio tags and public service announcements, as with any other M&O materials, sponsorships and media buys, must be similarly reviewed.

All CSI M&O materials, both stand-alone and bundled, must explicitly promote the California Solar Initiative program and adhere to the guidelines set forth to receive approval. The Energy Division will require a minimum of seven days from the submission to approve. Expedited review may be requested on a case-by-case basis in the event of unforeseen deadlines.

Send materials to staff in electronic format:

- To: Amy Reardon,  
Energy Division Analyst  
California Solar Initiative  
[arr@cpuc.ca.gov](mailto:arr@cpuc.ca.gov)
- Cc: Molly Tirpak-Sterkel, Energy  
Division Supervisor  
DG/CSI Section  
[mts@cpuc.ca.gov](mailto:mts@cpuc.ca.gov)

When submitting materials for approval, please identify columns A-F in the following Interim CSI M&O Approval Request Form to provide staff with details about the project:

A	B	C	D	E	F	G	H	I	J
Project Req.Date	M&O Category	Budgeted in M&O Plan	Proj. Cost Est.	Est. Follow- up	Total Est. Cost	Proj. Inv. Date	Actual Proj. Cost	Actual Follow- up Cost	Total Actual Costs
						Date 1			
						Date 2			
						Date 3			

- Column A: Date of Project Approval Request
- Column B: M&O Category. Identify which category from the approved Interim M&O plan this project refers, for example "Web Enhancement" or "Solar Contractor Training."
- Column C: \$ Budgeted. Identify how much was approved in the Interim M&O budget.
- Column D: Project Cost Estimate. Provide estimated cost from vendor, staff time, materials (such as printing,) fulfillment, shipping, storage or any other costs estimated within the total project.

- Column E: Estimated Follow-up costs; Identify estimated costs associated with follow-up practices such as a dedicated URL, phone number, mail follow-up, call-backs, email follow-up, offer fulfillment, or other follow-up costs for the project.
- Column F: Total Estimated Costs. Sum of estimated project and follow-up costs.

When project is completed, please submit the completed columns G-J:

- Column G: Project Invoice Date. This is the date that any final invoices are received by the PA from the vendor or the day that associated costs are expensed. If portions of a project are expensed at different times, PAs should submit iterative updates.
- Column H: Actual Project Costs. Identify the actual costs expensed to the CSI M&O Budget, including final invoices, staff time and other costs.
- Column I: Actual Follow-up Costs. Identify the actual costs associated with follow-up activities for the project.
- Column J: Total Actual Costs. This is the sum of all invoices and costs, including follow-up costs, incurred by the projects.

Please maintain a running log of all 2009 Interim M&O activities.

Materials will be reviewed based on but not limited to the following criteria per D.07-05-047:

1. Stand-alone materials should be patterned after materials on the "GoSolarCalifornia" website. Currently, PAs have adopted the "blue sky" motif seen throughout the website, using blue/cloud, yellow and white.
  - a. All CSI materials, both bundled and stand-alone, must bear the Go Solar, California logo. Please refer to the GSC Logo Guidelines, Attachment C.
2. The materials must, whenever possible, reference the program administrator's role in the program.
3. Content must mention energy efficiency audit requirements to promote State guidelines and proper system sizing.
4. Text must refer readers to the GoSolarCalifornia website in addition to the PA website and other contact information.

In addition to the above, the ED has discretion to approve and suggest modifications to materials if they do not conform to the order or to the PA's approved Interim M&O plan. Notice of approval or instructed revisions will be sent to the PA via email.

Any expense for activities or materials that is not expressly called out in the approved M&O plan and/or approved by the Energy Division in advance is subject to disallowance.